U.S. Department of Energy

Discoverer Ad Hoc Reporting User Guide

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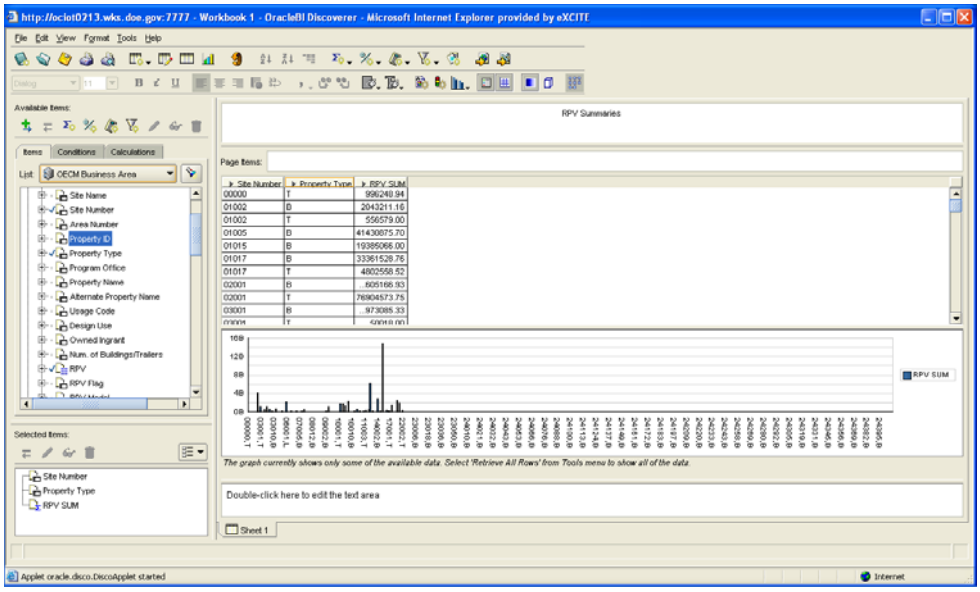

Available electronically at:

FIMS Web Site at http://fimsinfo.doe.gov

CAS Web Site at http://caisinfo.doe.gov

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Title Page

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Summary of Changes Page

The following information is being used to control and track modifications made to this document.

Revision # & Date	Author	Release/ Enhancement #	Summary of Changes
8/10/2007	Norm Ayers	1.1	Correct the publication date on the front page from 2006 to 2007 and saved the document in the repository as new version 1.1.
8/30/2007	Ruth Ann Smith	1.2	Corrected the numbering of chapters
8/6/2008	Gayle Smith	1.3	Updated website addresses.
3/26/2009	Gayle Smith	1.4	Renamed manual to Discoverer Ad Hoc Reporting Guide and changed reference throughout manual.

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1. Introduction

This *Discoverer Ad Hoc Reporting User Guide* is aimed at users who are already familiar with FIMS and who wish to develop and analyze FIMS custom queries and reports. The goal of this document is to familiarize you with the layout and major features of the Discoverer Ad-hoc Reporting system and to outline the most common tasks needed to develop ad hoc reports. ***More detailed information about system functionality, including all menus and buttons, can be obtained by selecting* Help | Help Topics *from the system's menu bar.*** This Help feature also provides a searchable index of topics.

(Note that the reporting system has been constructed with Oracle's Discoverer Plus ad hoc query and reporting tool. Consequently, much of the on-line help will refer to the system as 'Discoverer' or 'Discoverer Plus'.)

Additional information about FIMS and its data can be found on the FIMS website at http://fimsinfo.doe.gov/documentation.htm. In particular, the *FIMS User's Guide and Reporting Guide* as well as the *FIMS Data Element Dictionary* provide more detailed information about system processes, database description, administration, reporting, and data element definitions.

1.1 Obtaining a User Account

User accounts can be obtained by contacting the FIMS Hotline at (301) 903-0850. Headquarters FIMS System Administrators can provide a new user account within 24 hours after a request is made. For security reasons, access to Discoverer Ad Hoc Reporting is restricted to DOE users working from a valid DOE computer network. In some cases, it may be necessary to make additional modifications to the DOE network firewall to allow users to access the system.

1.2 System Requirements

The Discoverer Ad Hoc Reporting system requires a Java-enabled web browser such as Microsoft Internet Explorer (version 5.5 or higher). You will also need to have the latest Java Runtime Environment (JRE) installed on your computer. In order to download and install the Java Runtime Environment (JRE), go to http://www.java.com. At the top of the page, you will see a message that says "Download FREE Java software for your computer desktop now" and an orange Download Now button below it. Click on the **Download Now** button to install the software. Please keep in mind that administrator rights will be needed in order to complete this installation.

It is also necessary that you have outbound access via port 4443 from your sites firewall. Please consult with your network administrators about this.

If you have any questions about whether your system meets the above requirements, please contact the FIMS Hotline at (301) 903-0850.

1.3 Logging In

For a user working from an approved DOE site or network, the system can be accessed by typing the following URL into a web browser:

https://caisweb.doe.gov:443/discoverer/plus

The login screen shown below will appear and will prompt you for several items:

- User Name - input user name
- Password - input password
- Database – input “pro920.world”
- End User Layer – input “fims_eul_owner” or “cais_eul_owner”

These fields represent the information necessary to access the system. This information will be provided by the Headquarters FIMS Administrator at the time of your account activation.

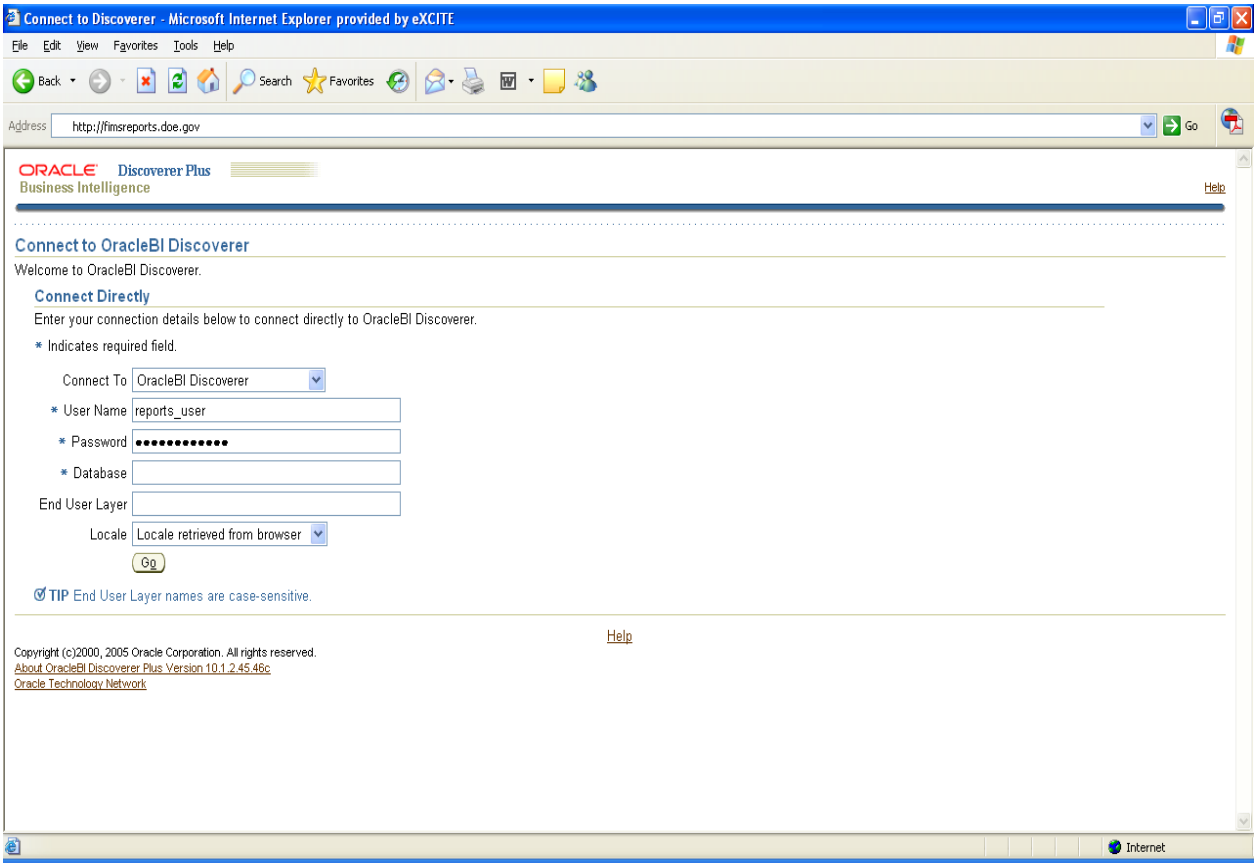

Figure 1 Discoverer Ad Hoc Reporting Login Page

2. Working in the System

2.1 Work Area

The work area is where you will do most of your analysis work with Discoverer Ad Hoc Reporting. The work area displays the current worksheet and tabs for other worksheets in the current workbook (described below). The system's navigation facilities make it easy to find your way around workbooks and worksheets to find the information you want.

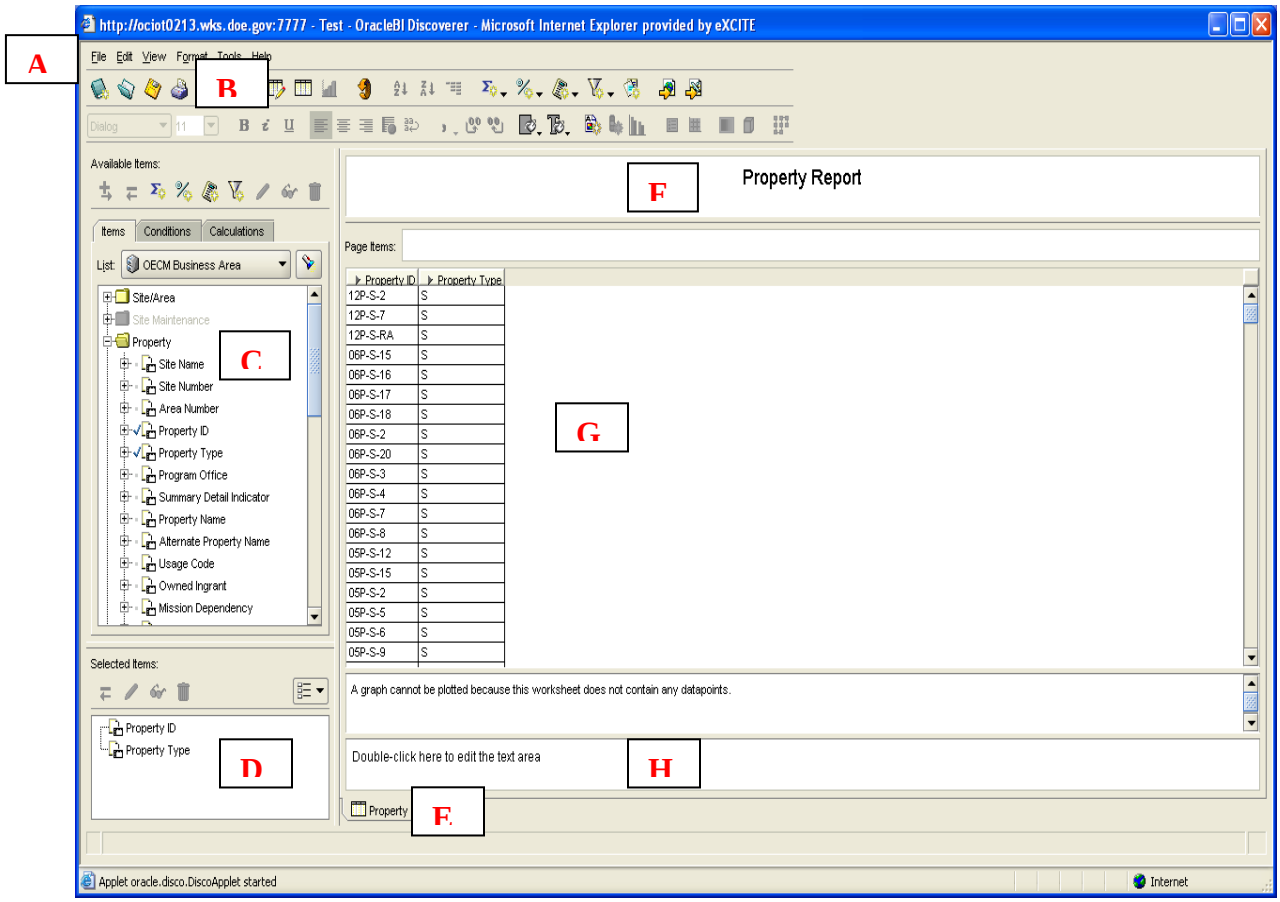

Figure 2 Work Area

Key to figure:

A. Menu bar. Click on a menu item (e.g. File) to display the menu options.

B. Standard toolbar. To display toolbars, choose **View** | **Toolbars** and choose the toolbar to display.

C. Available Items Pane, showing the data folders and items available for inclusion in reports. To display the Available Items Pane, choose **View** | **Available Items Pane**.

D. Selected Items Pane, showing the items included in the worksheet and graph area. To display the Selected Items Pane, choose **View** | **Selected Items Pane**.

E. Tabs for worksheets in the workbook. Click on another worksheet tab to display that worksheet.

F. Worksheet title area (also referred to as the worksheet header). To display the worksheet title area, choose **View** | **Title**.

G. Worksheet and graph area. This is where the results of your report are displayed.

H. Worksheet footer. To display the worksheet text area, choose **View** | **Text Area**.

Folders in the Available Items Pane (F) organize FIMS data into convenient, related groupings with common English field names. When you are working with the system, use the following drag and drop features:

- Add items to a worksheet by dragging and dropping the item from the Available Items pane onto the worksheet
- Reposition items on a worksheet by dragging and dropping items into position

Items can also be added to, deleted from, or moved on a worksheet by selecting the appropriate option from the Edit menu.

2.2 About Workbooks and Worksheets

Workbooks are files that contain worksheets displaying data retrieved from the database. If you are familiar with spreadsheet applications (e.g. Microsoft Excel) think of a workbook as a spreadsheet file. Discoverer Ad Hoc Reporting workbooks are stored in the database. Workbooks typically contain data that is related in some way but organized to show different perspectives.

You use workbooks in the following ways:

- You can create your own workbooks that you can subsequently share with other Discoverer Ad Hoc Reporting users. Or, you can use workbooks created by other users.
- You can include parameters to filter the workbook each time it is opened or refreshed. Including parameters enables workbook users to filter out data that they are not interested in and go directly to the data that they want to analyze.
- You can save workbooks to the database to maintain a library of custom reports.

Worksheets contain the data that you want to analyze, together with a number of components to help you analyze the data. For example, a worksheet can contain parameters, totals, percentages, exceptions, and calculations. You create a worksheet in a workbook. If you are familiar with spreadsheet applications (e.g. Microsoft Excel) think of a workbook as a spreadsheet file and worksheets as different sheets in that spreadsheet file.

2.3 Creating a Workbook

When you create a new workbook, the system immediately prompts you to create a new default worksheet to go into the workbook.

To create a new workbook:

1. Log in to the system. If you have already started the system, choose **File | New** to display the "Workbook Wizard: Create/Open Workbook dialog."

2. Select the "**Next**" button to continue to the selection of fields for the report.

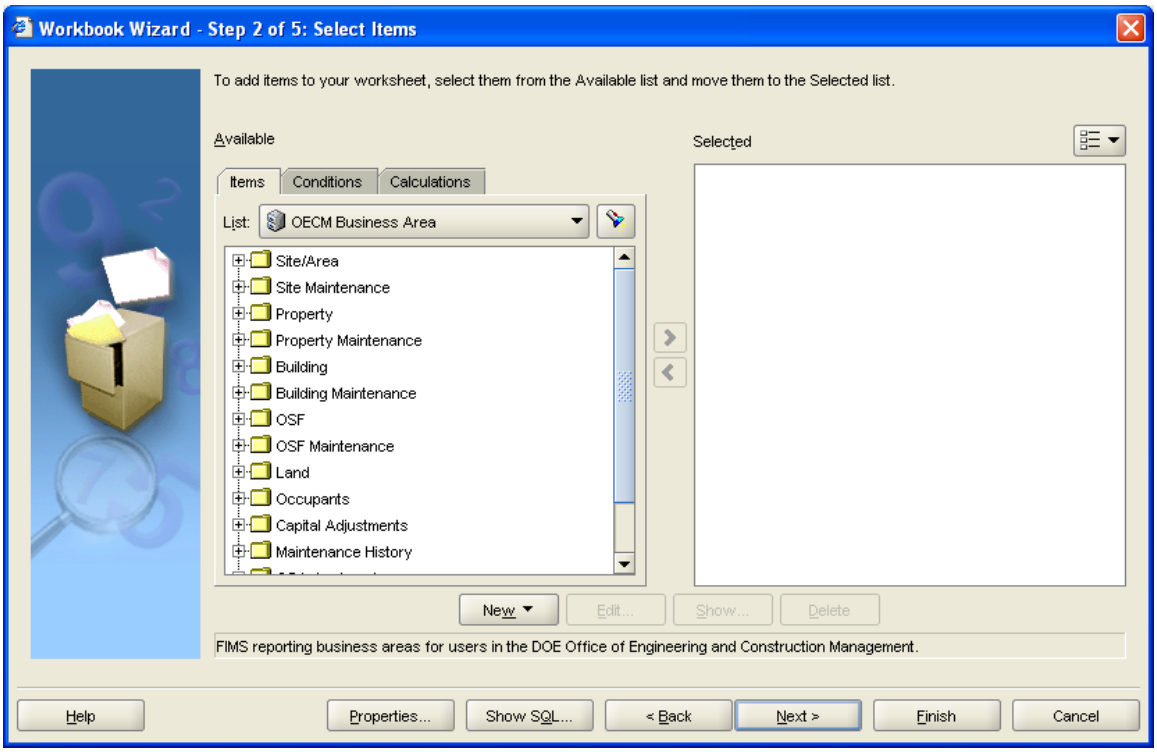

Figure 3 Workbook Wizard

3. The OECM Business Area contains a list of folders and within each of these folders are FIMS data elements or items that can be selected to be included in the new worksheet. Move the folders and items that you want to include in the new worksheet from the "Available" list to the "Selected" list. You can do this by selecting the item and clicking on the arrow in the center of the window or dragging the item directly to the Selected window. A brief description of the folders within the OECM Business Area can be found in Appendix A of this document.

Hints:

- Click the plus (+) sign next to a folder to expand the folder to view the items within the folder.
- You can select more than one folder or item at a time by pressing the Ctrl key and clicking another folder or item.
- If you select a folder, you select all items in that folder.
- Click the plus (+) sign next to items to expand items.
- Selecting a numeric item automatically includes its default aggregates (e.g. Sum, Count, Max). You can also expand a numeric item list and select individual aggregates.
- Having specified the folders and items to include in the worksheet, you can add other features to the worksheet or close the Worksheet Wizard to start analyzing the worksheet data.

4. Click **Next** to display the "Edit Worksheet dialog: Table Layout tab" or "Edit Worksheet dialog: Crosstab Layout tab", where you can change the default position of worksheet items. You can change the position of the worksheet items by clicking on the data element name and dragging the column to the position in the worksheet you would like it to be positioned. There is also a check box on this window that allows duplicate rows to be hidden. For example, if a FIMS report contains a group of rows that contain a program office value of EM, EM would only be displayed for the first row in that group. Items can also be deleted from the worksheet by selecting the item and pressing the Delete key.

5. Click **Next** to display the "Edit Worksheet dialog: Sort tab", where you can change the default sort order of worksheet items. This can be accomplished by clicking on the Add button and then selecting an item to sort on. Use the Direction drop down list to change the order in which the data is ordered. Low to High sorts alphabetically from A to Z and 1 – 10. High to Low sorts alphabetically from Z to A and 10 – 1. You also have the option to hide the sorted item on the worksheet by clicking in the checkbox. Additional sort items can be created by clicking on the Add button. If you wish to change the order of precedence of the selected sort items, you can click on the particular item and click on the Move up or Move down buttons as appropriate.

6. Click **Next** to display the "Edit Worksheet dialog: Parameters tab", where you can add parameters to the worksheet that prompt system end users to enter dynamic values to customize the worksheet. To create a New Parameter, click on the New button and input the information on the Edit Parameter window. The establishment of Parameters is optional. As you begin to work with this tool, you may find it more convenient to use the Conditions tab which will be discussed later in this document.

7. Click **Finish** to save the layout and close the worksheet wizard. The system displays the new worksheet. Now you are ready to begin analyzing data. Please note that if Parameters were established during the creation of the worksheet, a window will appear prompting you to input your parameter values prior to displaying the new worksheet.

8. (Optional) You can add new items to the worksheet as required. For example:

- parameters
- sorts
- totals
- percentages
- conditions
- calculations

2.4 Adding Worksheets

You add a worksheet to a workbook when you want to analyze data in a new way. You can add a worksheet in two ways:

- by creating a copy of an existing worksheet in the current workbook and modifying the copy to meet your needs
- by creating a completely new worksheet using the Worksheet Wizard to guide you through the process (as described below)

To create a copy of an existing worksheet:

1. Start the system and open the workbook that contains the worksheet you wish to duplicate.

2. Choose **Edit** | **Duplicate Worksheet** and select As Table. The Duplicate As Table window will be displayed. Modify the worksheet as appropriate and then click on the OK button.

To create a completely new worksheet:

1. Start the system and open the workbook to which you want to add a worksheet.

2. Choose **Edit** | **Add** Worksheet... to display the Worksheet Wizard.

3. Follow the instructions on the Worksheet Wizard. The new worksheet is added to the workbook.

When multiple worksheets exist within a workbook, there will be tabs at the bottom of the window and you can click on to access the various worksheets. To change the name of any of the sheets, right click on the tab and select Worksheet Properties. Modify the value in the name field and click on the **OK** button.

2.5 Editing Worksheets

The system's layout tools enable you to format worksheets exactly how you want them. For example, you might want to:

- add items to a worksheet
- remove items from a worksheet
- change the color of rows and columns
- change the background color or title of worksheets
- change the format of text and numbers
- change the column width on table worksheets

You can edit worksheets using any of the following methods:

- by dragging and dropping a worksheet item from one area of a worksheet to another area (you can also resize worksheet columns using drag and drop)
- by right-clicking on any area of a worksheet (e.g. a graph, worksheet item, worksheet item heading) to display a list of options for that area.
- by using the Edit Worksheet wizard

To edit a worksheet using the Edit Worksheet Wizard:

1. Display the worksheet that you want to edit.

2. Choose **Edit** | **Worksheet...** to display the "Edit Worksheet dialog".

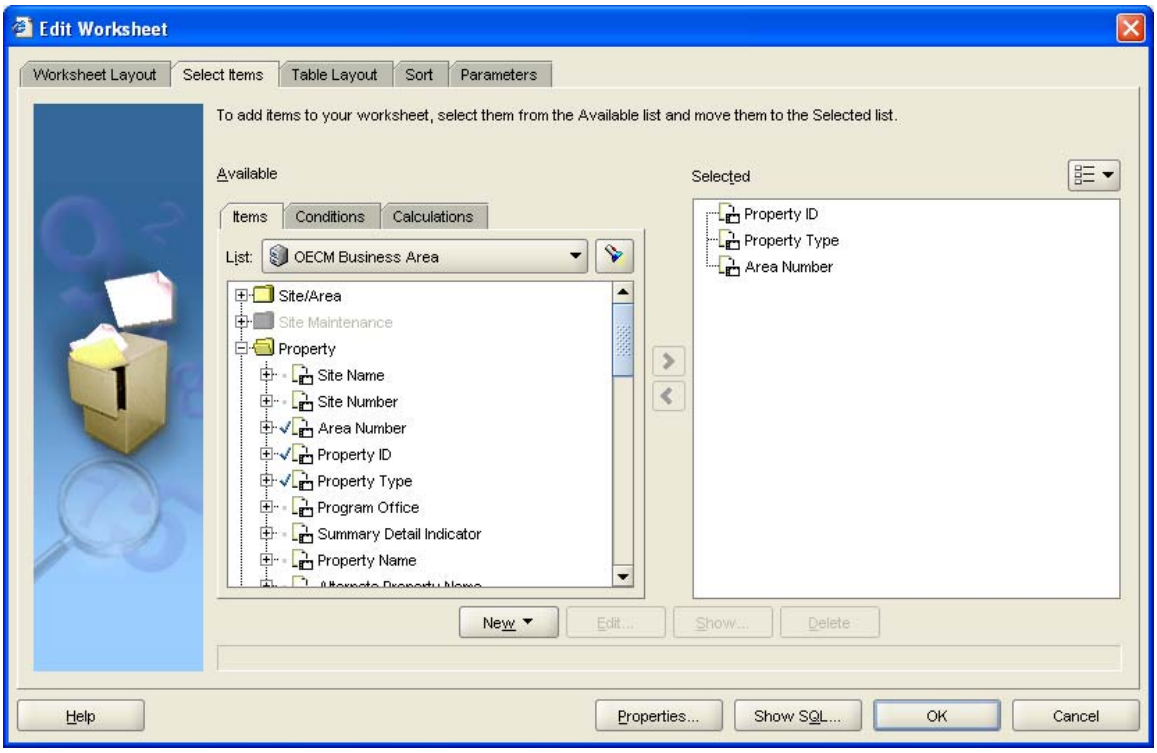

Figure 4 Edit Worksheet

The tabs on the Edit Worksheet dialog enable you to edit the properties of the current worksheet, as follows:

- use the Worksheet Layout tab to select the worksheet elements (e.g. title area, graph) to display on the worksheet
- use the Select Items tab to specify which items to display on the current worksheet
- use the Crosstab/Table Layout tab to change the layout of the current worksheet
- use the Sort tab to change the sort order of items on the current table worksheet (e.g. title area, graph) to display on the worksheet
- use the Parameters tab to manage existing parameters and create new parameters (for more information, see "Edit Worksheet dialog: Parameters tab")

3. Click **OK** to save changes you have made and return to the worksheet. The system updates the worksheet with the changes that you specified.

3. Conditions

Conditions are worksheet items that enable you to choose what data to display on worksheets. Conditions filter out data that you are not interested in, enabling you to concentrate on data that you want to analyze. For example, you could produce a report that only displays records meeting the following conditions:

- Program Office = NNSA
- Site = Lawrence Livermore National Lab
- Property Type = Building
- RPV >= $100,000

Worksheets can contain conditions defined by you. Conditions work as follows:

- If you have the privileges to edit a worksheet, you select which conditions to apply to the worksheet.
- When you create a condition, the condition is available to all worksheets in the workbook. You apply the condition to individual worksheets.
- If none of the existing conditions filter the data exactly as you want, you can create your own conditions and apply them to the worksheet.
- To apply conditions more flexibly, you can use parameters to give workbook users a choice of what data to display on a worksheet
- Conditions created when a parameter is added to a worksheet are automatically selected when the parameter is turned on, and automatically deselected when the parameter is turned off.

3.1 Creating a Condition

To create a single condition:

1. Choose **Tools** | **Conditions** to display the "Edit Worksheet dialog: Select Items tab: Conditions tab". In the example below, a condition exists that this worksheet will only produce data for assets where the Program office field contains a value of ‘EM’.

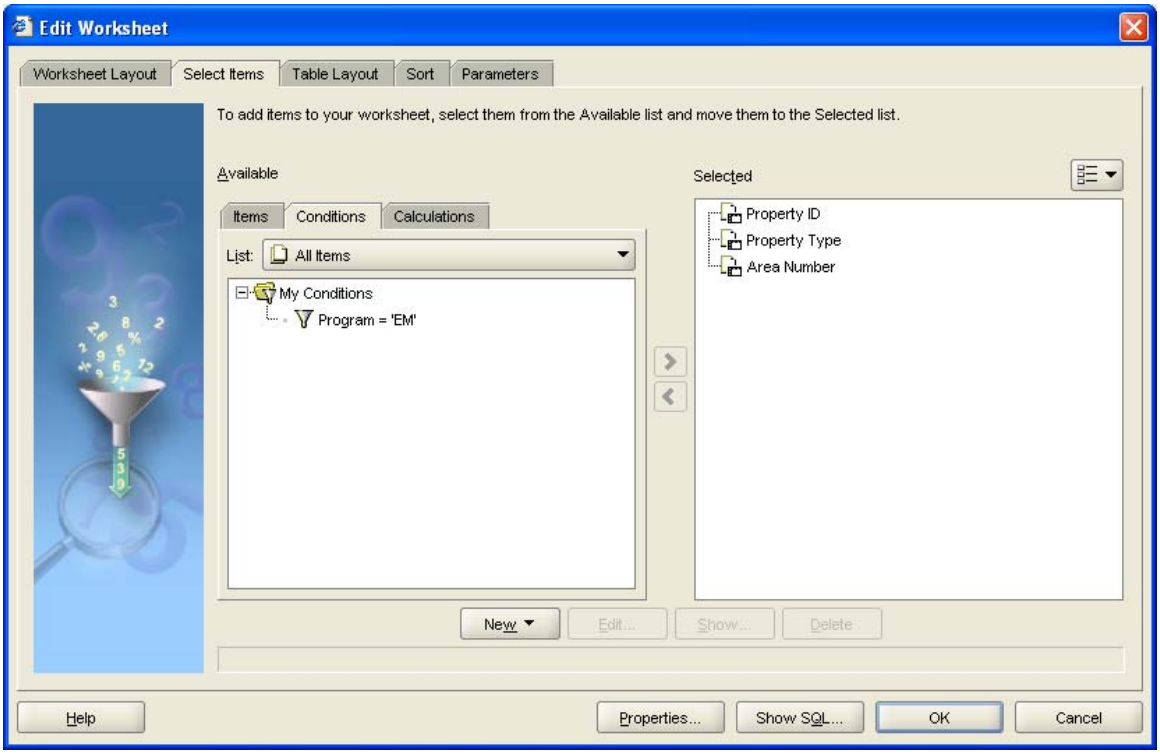

Figure 5 Conditions Tab

2. To display the "New Condition dialog" window, click on the **New Condition** button on the tool bar or right click on **My Conditions** in the Conditions window and then click on **New Condition**.

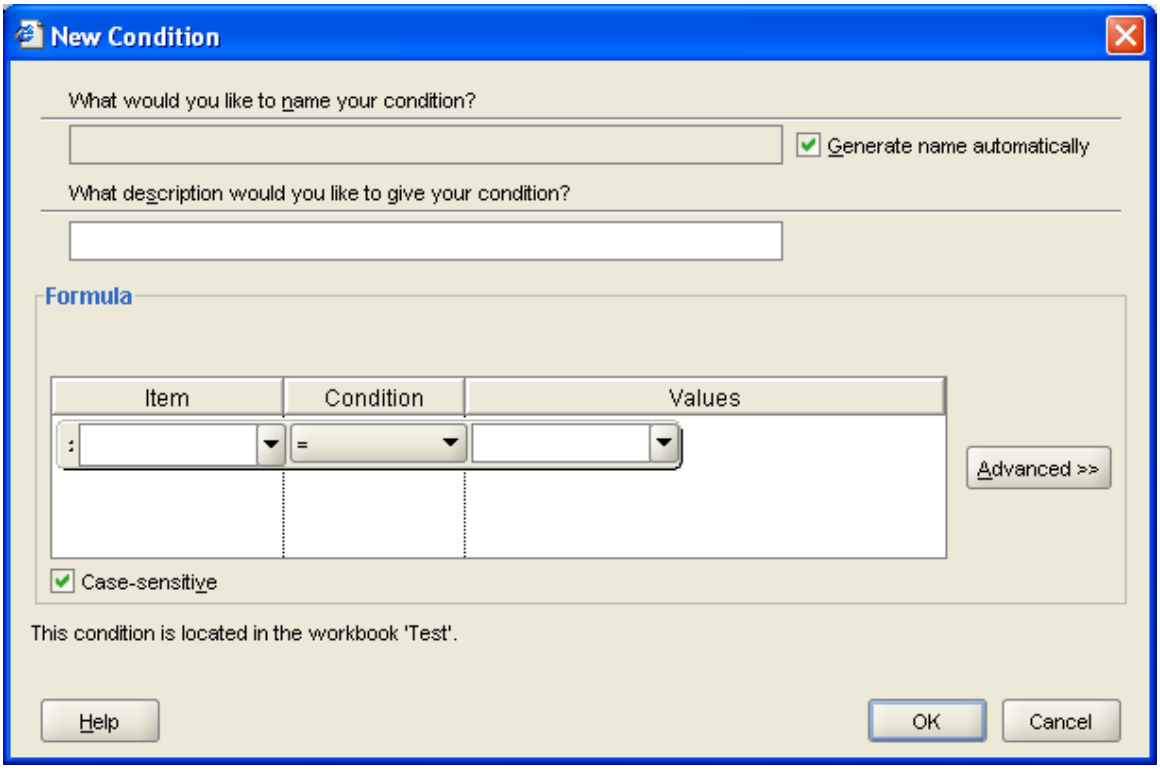

Figure 6 New Condition

3. In the **"**What would you like to name your condition" field, specify a name for the condition.

Hint: If you want the system to create a condition name for you from the conditions statements that you enter, select the **Generate name automatically** check box. The name that is generated will be the same as the item name from the folder.

4. (Optional) Use the "What description would you like to give your condition" field to enter additional information about the condition. For example, hints and tips about when to use the condition. This information is displayed to workbook users when holding the mouse over the condition name..

5. Use the "Formula" area to define the condition statements:

- Use the "Item**"** drop down list to choose what item you want to filter the data on. For example, you might choose RPV to display data for a particular range of RPVs.

  Hint: The **"**Item**"** drop down list shows the items available in the worksheet that you can use in the condition. You can use items that are not currently displayed on the worksheet by clicking on **More Items**. A pop up window will appear that will display the remaining items from the folder.

- Use the "Condition" drop down list to choose how to match data against the item. For example, you might select '>' here to filter data where the RPV is greater than a certain dollar amount.

- Use the **"**Values**"** field to define what data you want to match against. For example, you might enter $100,000 here to look only at data for which RPV is greater than $100,000.

- For those users who wish to build a more advanced condition, click on the Advanced button. The formula window will be expanded to allow you to add additional items to include and/or conditions. A Delete button also exists to remove any item that you wish to remove from the formula window.

6. If you want to match upper and lower case text data exactly, select the **"Case sensitive**" check box.

7. Click **OK** to save the details and close the Conditions dialog. You will be returned to the worksheet. The new condition appears in the Conditions dialog and is turned on. The system filters the worksheet to display only data that matches the condition. Data that does not match the condition is not displayed.

4. Totals

Totals are worksheet items that enable you to quickly and easily summarize rows and columns. For example, to calculate the sum of a column deferred maintenance, or to calculate the average of a set of RPVs. You can then use the totals to analyze the worksheet data.

You use totals to calculate:

- the result of applying a calculation to totals
- the result of adding values
- the number of values (the Count)
- the lowest of the values (the Minimum)
- the highest of the values (the Maximum)
- the square root of the variance (the Standard Deviation)
- the amount of variance in a set of values (the Variance)

When a worksheet contains totals, you can:

- display the totals (or turn the totals on)
- hide the totals (or turn the totals off)

To create a total on a worksheet :

1. Display the worksheet that you want to analyze.

2. Choose **Tools** | **Totals** to display the "Edit Worksheet dialog: Select Items tab: Calculations tab". An alternative approach would be to click on the Totals button on the tool bar.

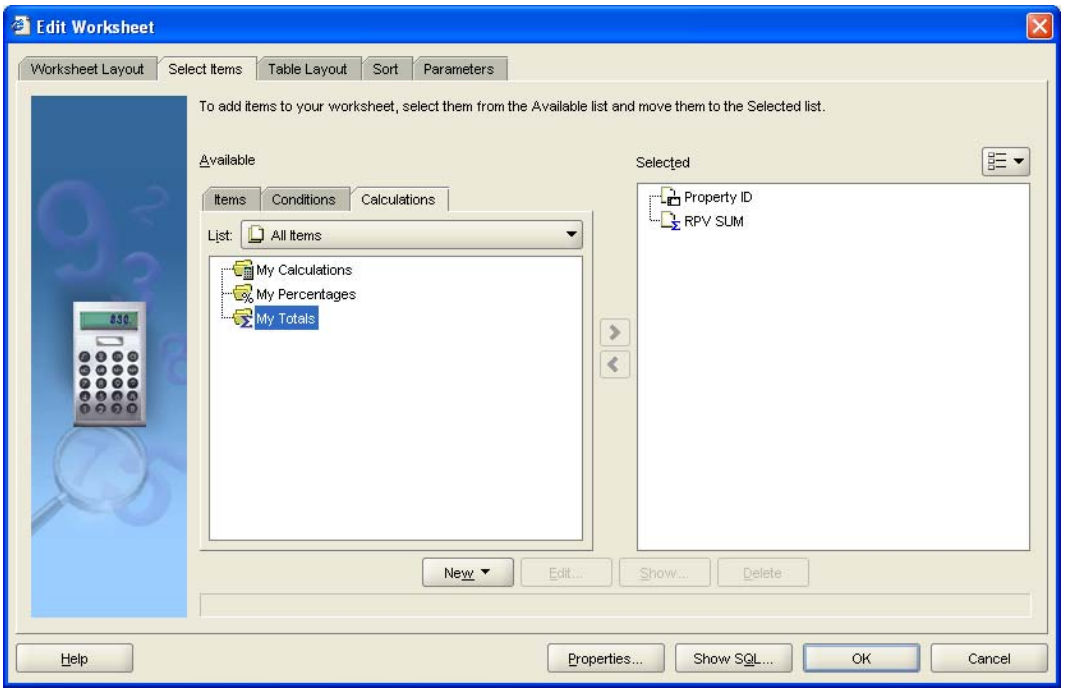

Figure 7 New Total

The Calculations tab lists existing calculations, percentages, and totals available in the worksheet. Active totals are marked with a tick symbol (or check mark) in the "Available" list and are also displayed in the **"**Selected**"** list.

3. Click **New** and select **New Total** from the drop down list to display the "New Total dialog".

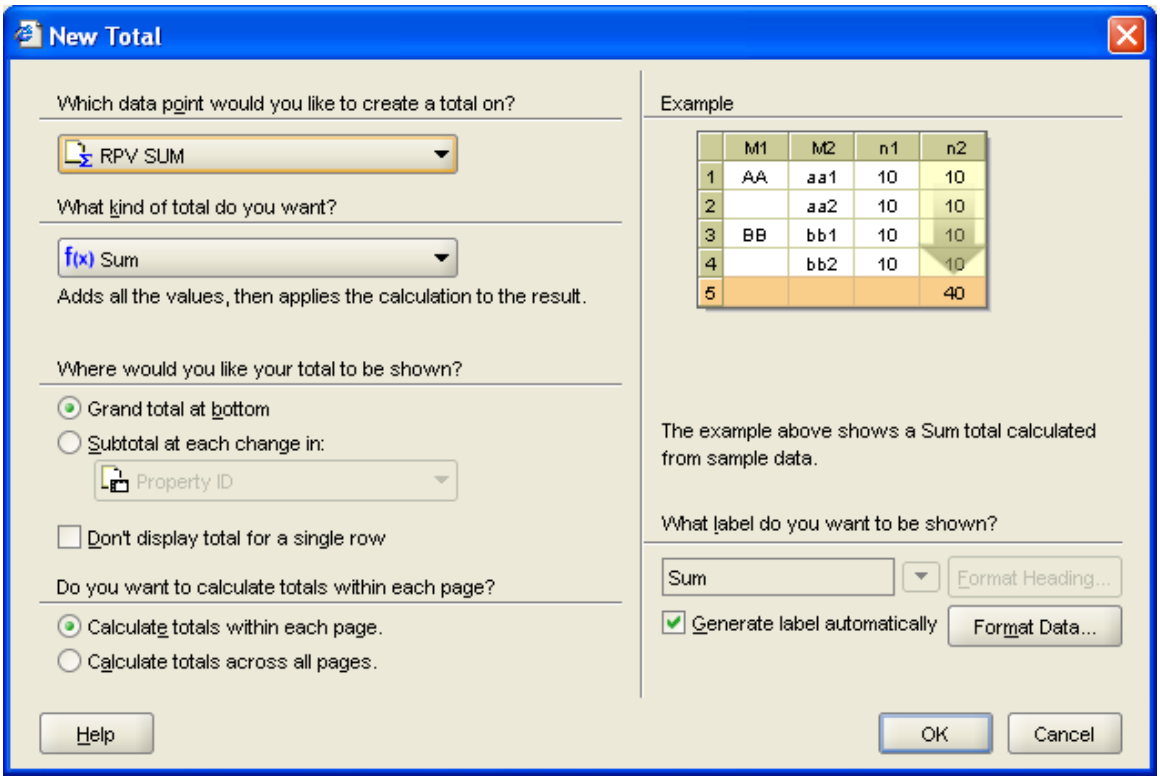

Figure 8 New Total

4. Under "**Which data point would you like to create a total on?**" select the item that you want to summarize from the drop down list.

Note: You can also create totals for all numeric items on the worksheet by selecting **"**All Data Points**"** from the drop-down list.

5. Under "**What kind of total do you want?"** select a total type from the drop down list.

For example, choose Sum to add the values, or choose Average to calculate a mean.

6. Under **"Where would you like your total to be shown?**" choose where you want to display the total. For example, select the **"Grand total at bottom"** radio button to calculate a grand total for a column and place it after the last row of the table.

7. If you select the "**Subtotal at each change in"** radio button, select the item on which to group the data from the drop down list. For example, if you sort the data by Site, you might want to see subtotals of RPV by Site.

8. If there is a possibility of having a single row in your worksheet, you may want to consider clicking on the check box for "**Don't display total for a single row**". This will prevent totals being displayed for a single row of data.

9. Under "**What label do you want to be shown?"** do one of the following:

- type in a label for the total
- use the drop down list to insert variable values into the label.

10. The Format Data button will allow you to customize how the total value will appear on the worksheet. This would allow you to modify the font, color, format, and alignment of the total value.

Note: Select the **Generate label automatically?** Check box if you want the system to generate a label for you. The label will be based on the item name from the folder.

11. Click **OK** to save the details and close the dialog.

12. Click **OK** to close the Calculations tab and return to the worksheet. The system calculates the total and displays it on the worksheet.

5. Sorting

You can use the system to sort data as follows:

- sort text data into alphabetical order
- sort numeric data into numerical order
- group sort data to many levels, for example, you can sort on City within Month within Year

Note that many convenient sorting options can be obtained by right-clicking on the heading of any given column:

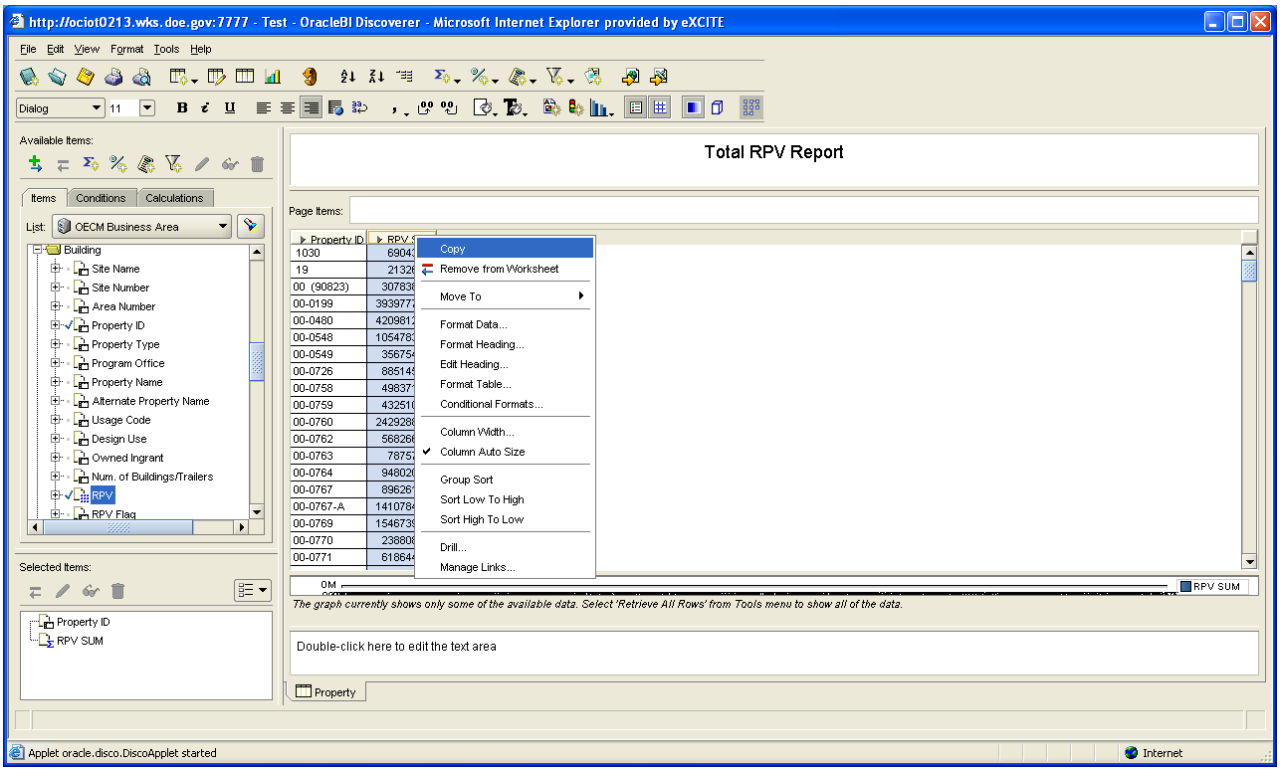

Figure 9 Sorting Menu (Right-click)

5.1 Sorting Table Data

To sort data on a table worksheet:

1. Display the worksheet that you want to sort.
2. Choose **Tools** | **Sort** to display the "Edit Worksheet dialog: Sort tab".

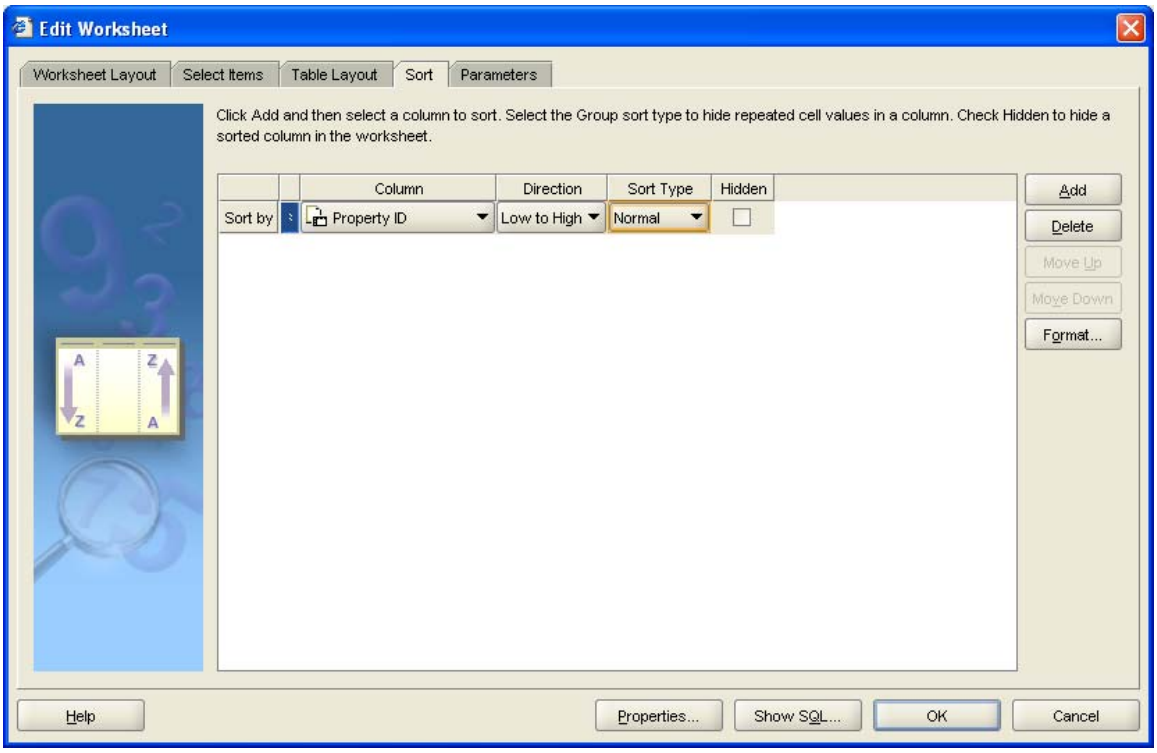

Figure 10 New Sort

3. Click **Add** to add a new row to the sort list and specify sorting options as required.

Hint: You can also:

- remove a sort item by selecting an item in the sort list and clicking Delete
- rearrange the precedence of sort items by selecting an item in the sort list and clicking either Move Up or Move Down
- hide the sorted column in the worksheet by clicking the "Hidden" radio button

4. Click **OK** to save the details and close the Sort dialog. The system refreshes the worksheet according to the sort options that you select.

6. Conditional Formats

A conditional format enables you to highlight worksheet values that meet a specific condition. For example, you might want to highlight deferred maintenance values greater than $1M. A stoplight format (or traffic light format) enables you to categorize numeric worksheet values as unacceptable, acceptable, and desirable using different colors. The default stoplight format uses the familiar red, yellow, and green color scheme to represent unacceptable, acceptable, and desirable values.

For example, you might want to categorize performance based on deferred maintenance where:

- values above $1,000,000 are unacceptable, and are shown in red
- values between $200,000 and $1,000,000 are acceptable, and are shown in yellow
- values less than than $200,000 are desirable, and are shown in green

When you use conditional formats and stoplight formats, note the following points:

- You can create conditional formats on both numeric and non-numeric worksheet items (e.g. text worksheet items). For example, you can create a conditional format for Site Name = "Los Alamos National Laboratory", or deferred maintenance SUM > $30,000,000.
- You can only create stoplight formats on numeric worksheet items.
- Stoplight colors are applied to all stoplight formats in a worksheet. If you change the stoplight colors, the system applies the changes to existing and new stoplight formats in the current worksheet

6.1 Creating a Conditional Format

You create a conditional format when you want to highlight worksheet values that meet a specific condition. For example, you might want to highlight percentage values greater than 75% by displaying them with a blue background.

To create a conditional format:

1. Display the worksheet that you want to format.

2. (Optional) Select the worksheet item that you want to format by clicking on the worksheet column or row.

3. Choose **Format** | **Conditional Formats** to display the "Conditional Formats dialog".

4. Click "**New Conditional Format**" to display the "New Conditional Format dialog".

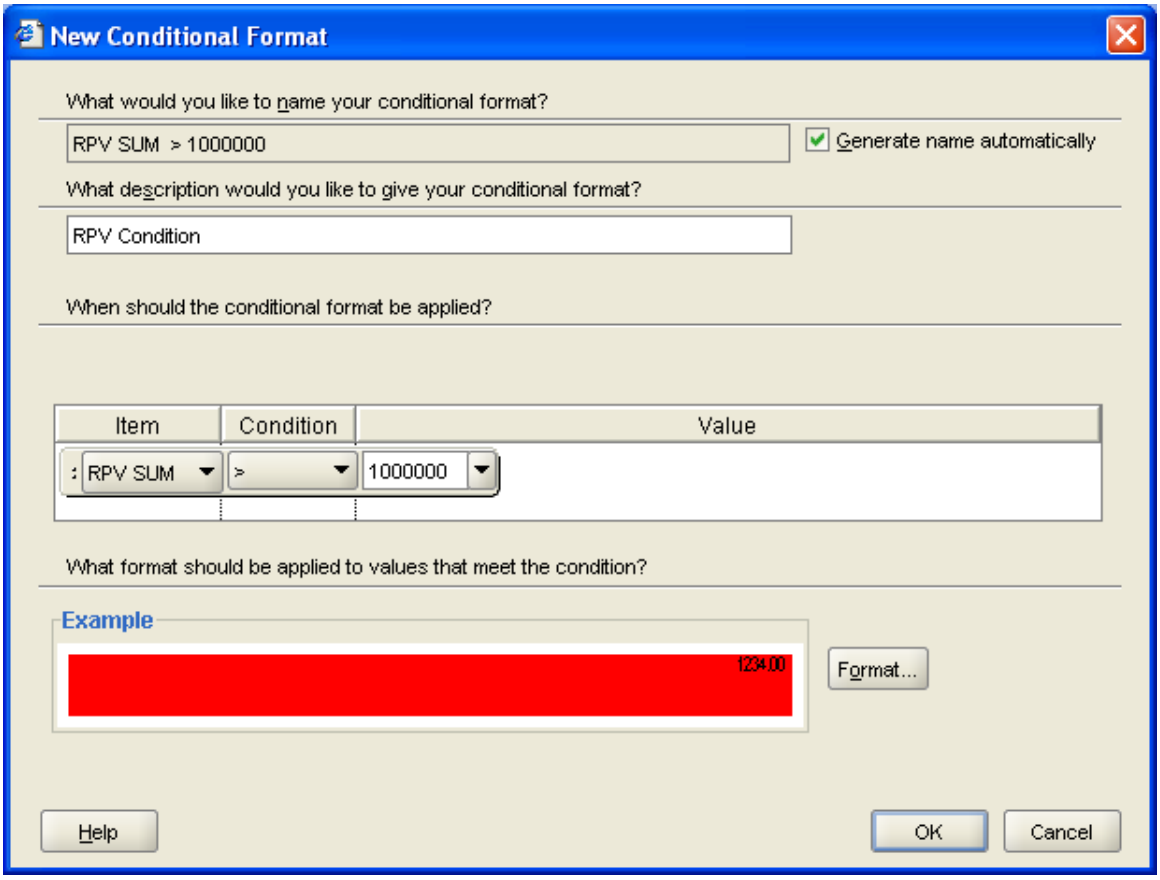

Figure 11 New Conditional Format

5. Specify how you want to highlight worksheet values, as follows:

- (Optional) Use the "**What would you like to name your Conditional Format?"** field to create a user-friendly name for the format that will be used throughout the system.
- Use the **"When should the Conditional Format be applied?**" to create the condition that you want to apply.
- Use the "**Value"** field to enter the value that you want to match against. For example, choose RPV SUM > $1,000,000 to highlight RPV SUM values that are greater than $1,000,000.
- Click **Format** to display the "Format Data dialog: Format tab" dialog, which enables you to change the color of and text style for the worksheet value specified in the "Item" field.

6. Click **OK** to save changes that you have made and close the New Conditional Format dialog.

7. Click **OK** to close the Conditional Formats dialog. The worksheet is updated with the formatting changes that you have made.

Stoplight formats are created in a similar manner by selecting "**New Stoplight Format**" on the "Conditional Formats dialog".

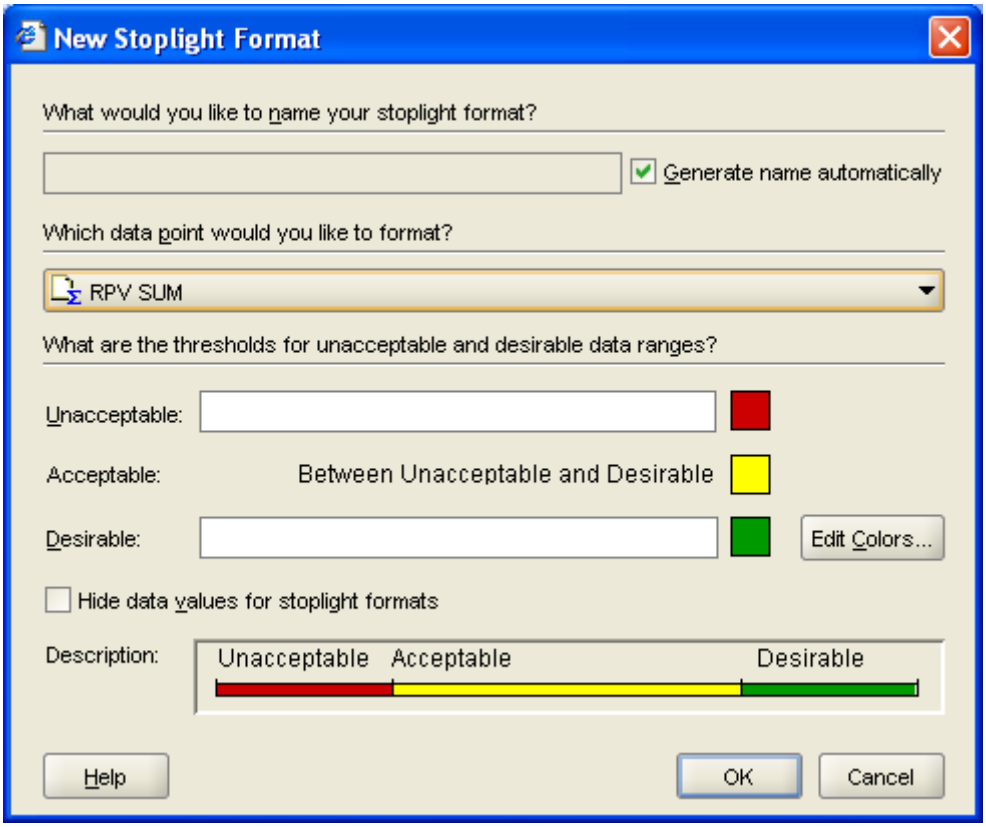

Figure 12 New Stoplight Format

7. Exporting Reports to Microsoft Excel

You can share your worksheets and graphs with other people by exporting the worksheets to popular application formats (Microsoft Excel). You can export:

- single worksheets
- all worksheets in a workbook
- graphs associated with worksheets

To export worksheet data:

1. Open the worksheet that you want to export.

2. Choose **File** | **Export** to display the "Export Wizard dialog: Select page", which enables you to specify the parts of the workbook you want to export. From this page, you have the option to export the entire workbook or just the current worksheet. Within the current worksheet, you can uncheck the box if you wish to export just the table or graph.

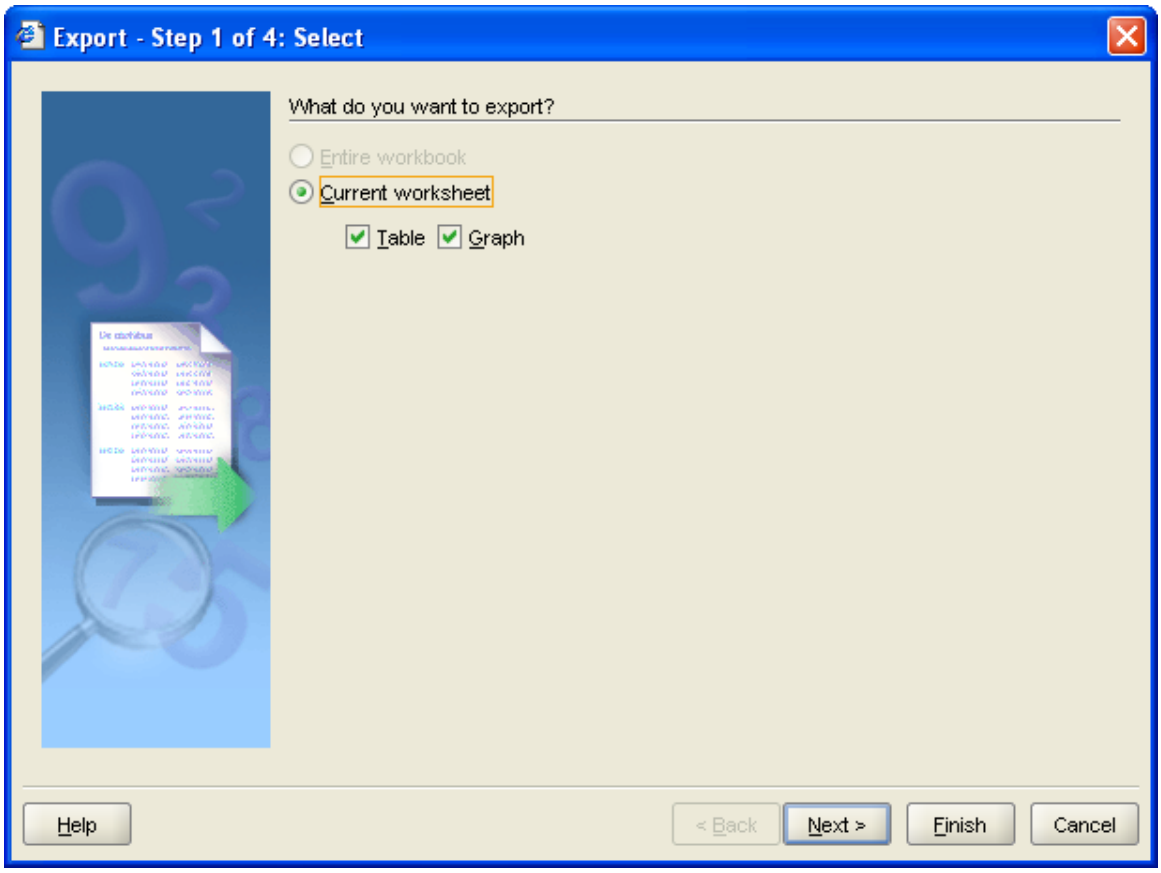

Figure 13 Export Wizard

3. Use the "Export Wizard dialog: Format and Name page" to specify the export format to use and specify where to save the export files. The most common formats selected are usually Microsoft Excel (.xls), Portable Document Format (.pdf), and Hyper-text markup Language (HTML). There are additional options that may be selected based on your reporting needs. From this window, you can also select the destination of your file and choose a file name.

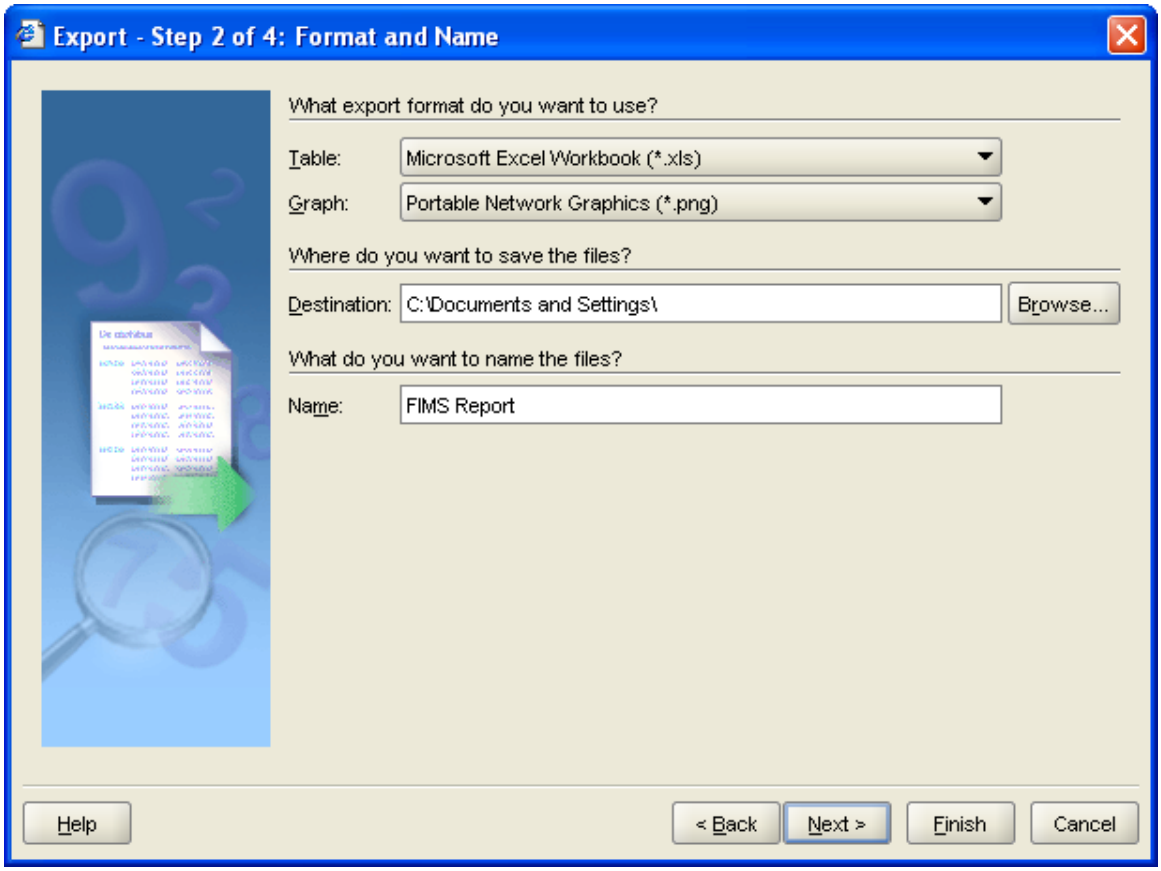

Figure 14 Export Format

4. If you are exporting graphs, use the "**Export Wizard dialog: Graph page**" to specify graph sizing options.

5. If the worksheet contains parameters, use the "**Export Wizard dialog: Parameters page**" to restrict the data that you export by entering parameter values. For example, you might want to export data for a single year, or export data for all years.

6. Use the "**Export Wizard dialog: Supervise page**" to choose whether or not to supervise the export to confirm warning messages. You will want to select the Supervised option if you feel that the export might take a long time or produce more than the maximum amount of data. This option also allows you to respond to warning messages during the export process. You will want to select the Unsupervised option if you want to export the data regardless of possible warnings about how long the export will take or how much data will be produced. For typical FIMS reports, the Unsupervised option should be selected.

7. Click **Finish** to start the export. The system displays the "Export Log dialog", which displays a list of files created during the export.

8. If you want to open the first export file in its associated application, select the "**Open the first exported sheet"** check box.

9. Click "**OK**" to close the Export Log.

Note:

- You do not have to use the Export Wizard to export the current worksheet (and an associated graph) to HTML or Microsoft Excel format. You will find it quicker to use the following menu options (and their equivalent toolbar buttons):
    - **File** | **Export to Excel**
      Use this menu option to export the current worksheet to Microsoft Excel format.
    - **File** | **Export to HTML**
      Use this menu option to export the current worksheet to HTML format.

8. Printing Reports

Typically, before reports are printed, you may wish to preview the output.

To select Print Preview:

1. Open the worksheet that you want to print.
2. Choose **File | Print Preview** to display the "Print Preview" page. From this page you can view the layout of the report.

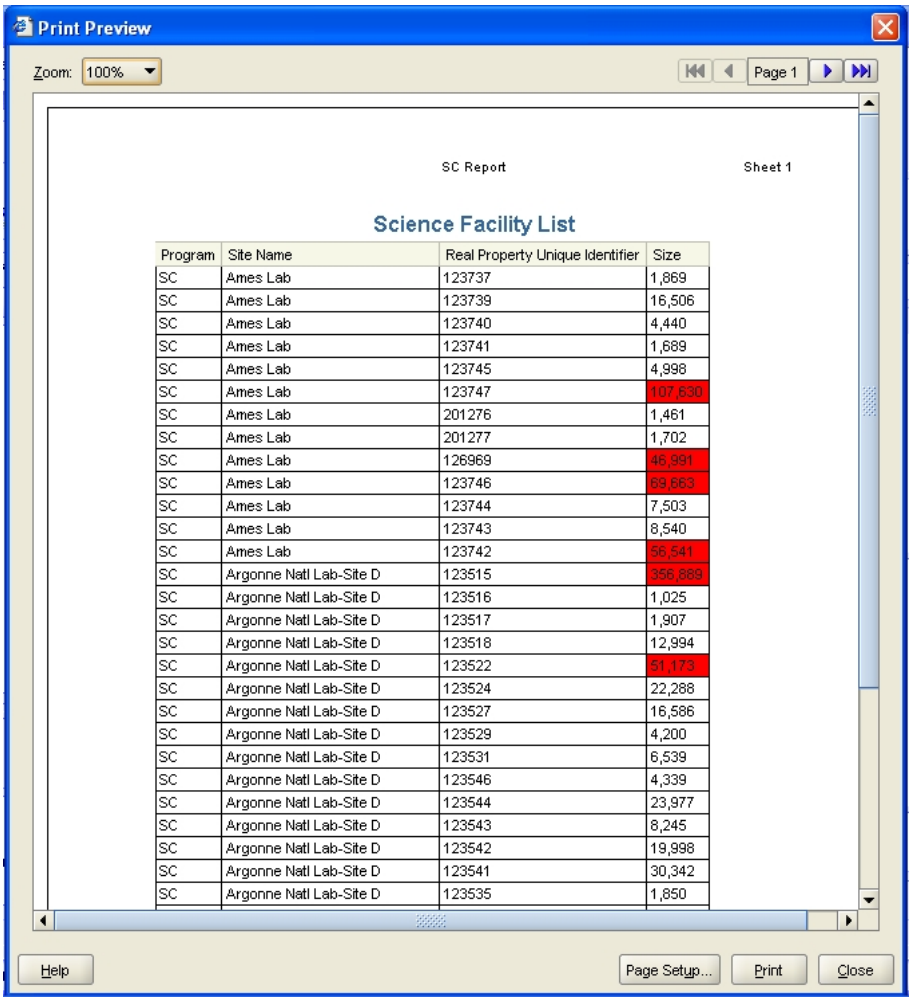

Figure 15 Print Preview

3. To customize the margins, orientation, headers and footers, click on the Page Setup button. The “Page Setup” page will be displayed with 4 tabs for Worksheet, Table, Margins, and Header/Footer. Click on each tab and make the appropriate modifications to the setup.

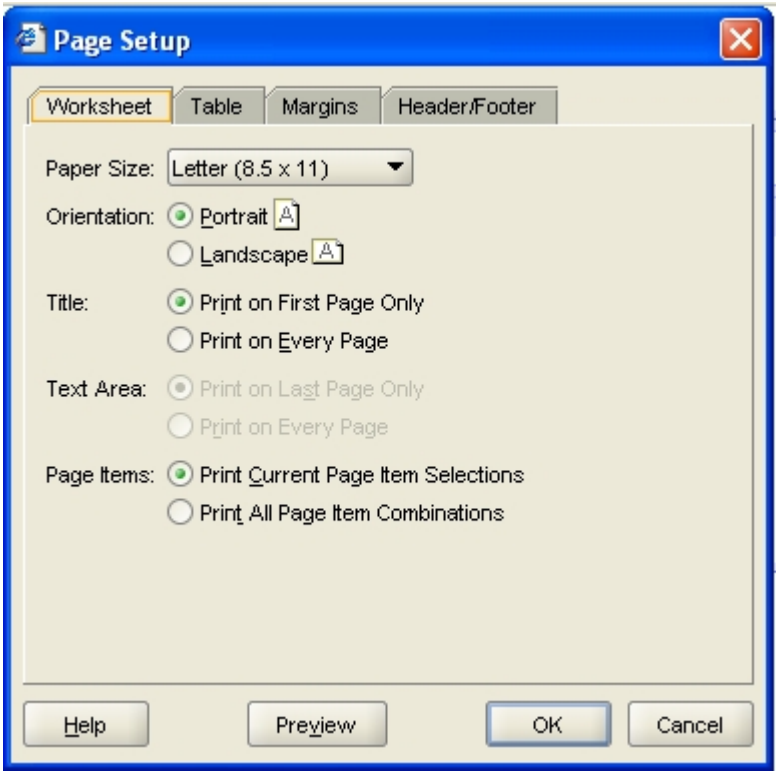

Figure 16 Page Setup

4. Click the **OK** button to close the “Page Setup” page. You will then be returned to the “Print Preview” page. This will enable you to see the results of the modifications made to the Page Setup.
5. Click on the **Print** button and the “Print” page will display. From here you can select the printer, print range and number of copies.
6. While the report is being routed to your printer, a “Print Sheet” dialog box will appear

Hint: Once you have customized the layout of the report, a much quicker way to print is to click on the Print icon on the tool bar. Once you click on the icon, the “Print” page will display. There is also a tool bar icon for the Print Preview. This can be used in lieu of the menus.

9. Sharing Workbooks

There may be occasions where it will be beneficial to share a workbook that you have developed with another user.

To Share a single workbook:

1. Open the workbook that you want to share.
2. Choose **File** | **Share** to display the “Share Workbook” page.

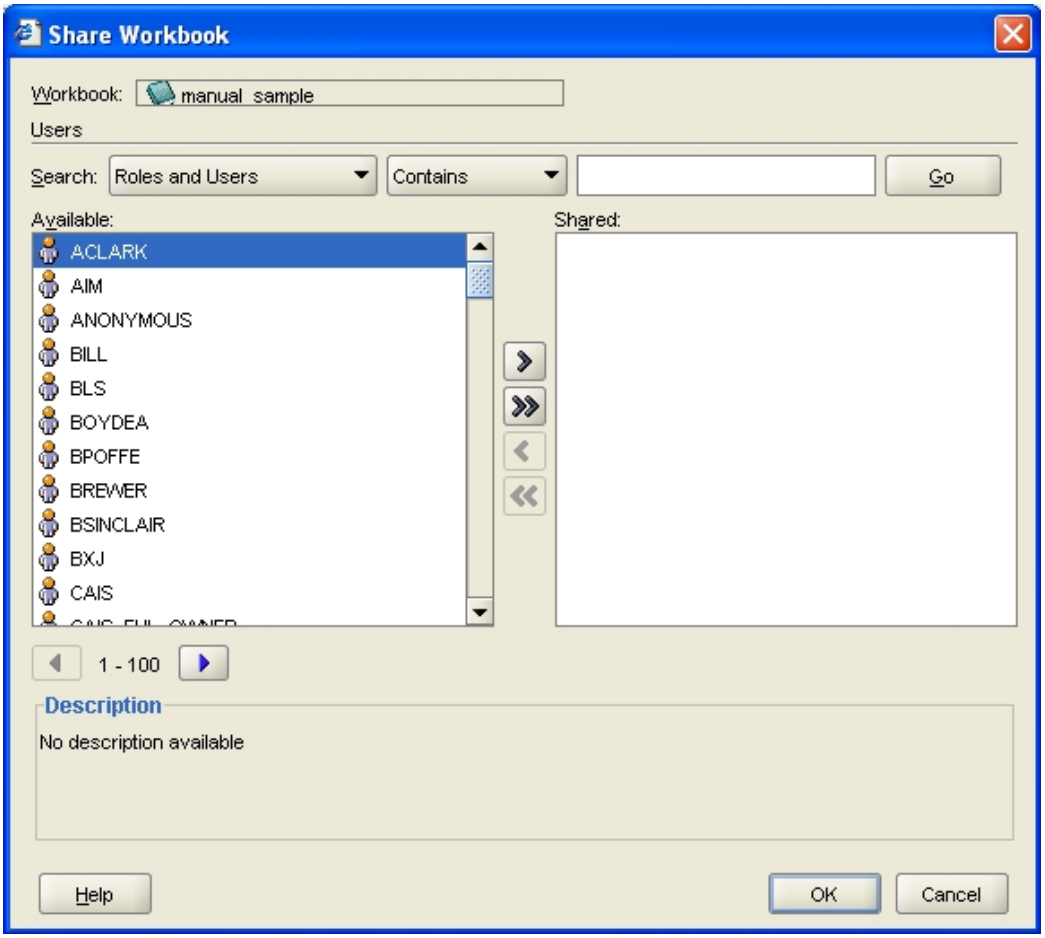

Figure 17 Share Workbook

3. Scroll through the list of available users and select the one you wish to share your workbook with. You can do this by selecting the user and then clicking on the arrow key in the center of the window. If done successfully, you will see that user in the Shared window. An alternative approach would be to click and drag the user to the Shared window.

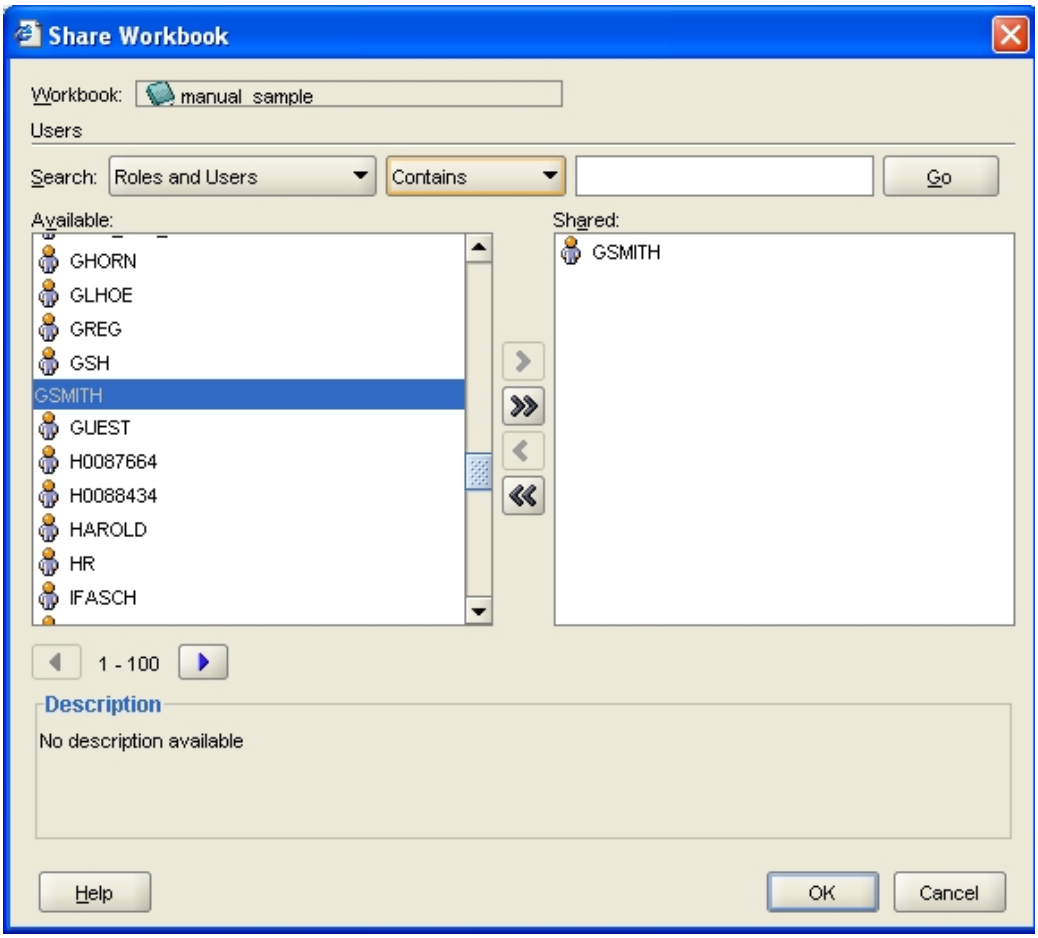

Figure 18 Successful Share Workbook

4. You can remove a user from the Shared window at any time by selecting the user and dragging them back to the available window.
5. When completed, click on the **OK** button to close the Share Workbook window.

Appendix A – OECM Business Area

This section provides a description of the folders that are contained within the OECM Business Area. For more detailed information on the FIMS database tables and columns, reference the *FIMS Reporting Guide* which can be obtained from the FIMS website (http://fimsinfo.doe.gov/documentation.htm).

Archive Folder – Includes data elements from the FIMS Archive table (FIMS_TBL_ARCHIVE)

Site Number	Measurement	Seismic Exemption	Pest Control Cost
Area Number	Net Sqft	Seismic Essential	Central Heating Cost
Property ID	No of Buildings	Design Use	Snow Removal Cost
Owned/Leased Indicator	No of Floors	Deferred Maintenance	Gas Cost
Property Name	No of Floors Below Grade	Required Maintenance	Refuse Cost
Alternate Name	Summary Condition	Actual Maintenance	Recycle Cost
Property Type	Deficiencies 1-5	Inspection Date	Grounds Cost
Detail Indicator	Model Building Type	Acquisition Method	Janitorial Cost
Usage Code	Program Office	Acquisition Date From/To	Hours of Operation
Acquisition Cost	Status	Acreage (Rural /Urban)	Geo City Code
Estimate Indicator	Status Date	Archived Date	Geo State Code
Total Improvement Cost	Transfer to PSO	Mission Dependency	Geo County Code
Excess Indicator	Land Ownership	Main Location	Zip Code
Excess Year	RPV	Using Organization	Congressional District
Outgrant Indicator	RPV Flag	OSF Secondary Qty	Estimated Disposition Yr
Asset Type	Status Utilization	Restrictions	Disposition Value
Reporting Source	Year Built	Electric Cost	Disposition Proceeds
Historic Designation	Year Acquired	Water Cost	Disposition Recipient

Building Folder – Includes selected data elements from the FIMS Property (FIMS_TBL_PROPERTY) and Building (FIMS_TBL_BUILDING), and Site (FIMS_TBL_SITE) tables.

Site Name	No of Buildings/Trailers	Asset Type	Status Utilzation
Site Number	RPV	Excess Indicator	Model Building Type
Area Number	RPV Flag	Excess Year	No of Floors
Property ID	RPV Model	Status	No of Floors Below Grade
Property Type	RPV Site Factor	Status Date	EC Buildings Gross Sqft
Program Office	Summary Condition	Historic Designation	EC Indust/Lab Gross Sqft
Property Name	Gross Sqft	Hazard Category	EC Metered Gross Sqft

Alternate Property Name	Net Usable Sqft	Year Acquired	NEC Buildings Gross Sqft
Usage Code	Acquisition Cost	Year Built	Meters 1-4
Design Use	Total Improvement Cost	Main Location	
Owned/Ingrant Indicator	Mission Dependency	Deficiencies 1-5	

Building Maintenance Folder – Includes selected data elements from the FIMS Property (FIMS_TBL_PROPERTY), Building (FIMS_TBL_BUILDING), Deferred Maintenance (FIMS_TBL_DEF_MAINT), and Site (FIMS_TBL_SITE) tables.

Site Name	RPV Model	Summary Condition	Model Building Type
Site Number	RPV Site Factor	Gross Sqft	Deficiencies 1-5
Area Number	Deferred Maintenance	Net Usable Sqft	Status Utilization
Property ID	Actual Maintenance	Status	Year Built
Property Type	Required Maintenance	Status Date	Year Acquired
Program Office	Rehab and Improve Cost	Acquisition Cost	Excess Indicator
Property Name	Conventional Facility Ind	Total Improvement Cost	Excess Year
Alternate Property Name	Modernization Indicator	Mission Dependency	Historic Designation
Usage Code	Owned/Ingrant Indicator	Asset Type	Hazard Category
No of Buildings/Trailers	RPV	RPV Flag	

Capital Adjustments Folder – Includes selected data elements from the FIMS Property (FIMS_TBL_PROPERTY), Capital Adjustment (FIMS_TBL_CAP_IMPROVE), and Site (FIMS_TBL_SITE) tables.

Site Name	Property Name	Total Improvement Cost	Main Location
Site Number	Alternate Property Name	Asset Type	Adjustment Date
Area Number	Usage Code	Excess Indicator	Adjustment Cost
Property ID	Owned/Ingrant Indicator	Excess Year	Adjustment Description
Property Type	Mission Dependency	Historic Designation	Capitalized Indicator
Program Office	Acquisition Cost	Hazard Category	

FRPP Folder – Includes selected data elements from the FIMS FRPP (FIMS_TBL_FRPP), Property (FIMS_TBL_PROPERTY), Deferred Maintenance (FIMS_TBL_DEF_MAINT) and Site (FIMS_TBL_SITE) tables.

Fiscal Year	Using Organization	Real Prop Unique Ident	Restrictions
Real Property Type	Size	City	Site Name
Real Property Use	Unit of Measure	State	Program
Legal Interest	Utilization	Country	Excess Year
Lease Maint Indicator	RPV	County	Estimated Disposition Yr

Status	Condition Index	Cong Districts	Property ID
Outgrant Indicator	Mission Dependency	Zip Code	Property Name
Historical Status	Annual Operating Cost	Installation Identifier	Deferred Maintenance
Reporting Agency	Street Address	Sub-installation Identifier	

Gsa Assigned Folder – Includes selected data elements from the Property (FIMS_TBL_PROPERTY), GSA Assigned (FIMS_TBL_GSA_ASSIGN) and Site (FIMS_TBL_SITE) tables.

Site Name	Property Type	Owned/Ingrant Indicator	Inside Parking
Site Number	Property Name	Notes	Outside Parking
Area Number	Alternate Property Name	Total Bill	Assign Usable
Property ID	Usage Code	Total Occupants	Common Space

Land Folder – Includes selected data elements from the Property (FIMS_TBL_PROPERTY), Land (FIMS_TBL_LAND) and Site (FIMS_TBL_SITE) tables.

Site Name	Property Name	Rural/Urban Acreage	Asset Type
Site Number	Alternate Property Name	Status	Excess Indicator
Area Number	Usage Code	Status Date	Excess Year
Property ID	Owned/Ingrant Indicator	Regulatory Basis	Historic Designation
Property Type	Acquisition Method	Acquisition Cost	
Program Office	Acquisition From/To Date	Mission Dependency	

Maintenance History Folder – Includes selected data elements from the Property (FIMS_TBL_PROPERTY), Maintenance History (FIMS_TBL_MAINT_HISTORY) and Site (FIMS_TBL_SITE) tables.

Site Name	Alternate Property Name	Inspection Date	Asset Type
Site Number	Usage Code	Rehab and Improve Cost	Excess Indicator
Area Number	Owned/Ingrant Indicator	Conventional Facility Ind	Excess Year
Property ID	Fiscal Year	Modernization Indicator	Hazard Category
Property Type	Deferred Maintenance	Mission Dependency	
Program Office	Required Maintenance	Acquisition Cost	
Property Name	Actual Maintenance	Total Improvement Cost	

Occupants Folder – Includes selected data elements from the Property (FIMS_TBL_PROPERTY), Occupants (FIMS_TBL_OCCUPANTS) and Site (FIMS_TBL_SITE) tables.

Site Name	Alternate Property Name	Excess Indicator	Occupant ID
Site Number	Usage Code	Excess Year	Occupant Type
Area Number	Owned/Ingrant Indicator	Outgrant Indicator	Occupant Name
Property ID	Mission Dependency	Historic Designation	No of Employees
Property Type	Acquisition Cost	Hazard Category	
Program Office	Total Improvement Cost	Main Location	
Property Name	Asset Type	Notes	

OSF Folder – Includes selected data elements from the Property (FIMS_TBL_PROPERTY), OSF (FIMS_TBL_OSF) and Site (FIMS_TBL_SITE) tables.

Site Name	Usage Code	Status Date	Historic Designation
Site Number	Owned/Ingrant Indicator	Deficiencies 1-5	Hazard Category
Area Number	RPV	Acquisition Cost	EC Bldgs Gsft
Property ID	Primary Dimension Code	Total Improvement Cost	EC Indust/Lab Gsft
Property Type	Primary Quantity	Mission Dependency	EC Metered Gsft
Program Office	Secondary Dimension	Asset Type	Meters 1-4
Property Name	Secondary Quantity	Excess Indicator	
Alternate Property Name	Status	Excess Year	

OSF Maintenance Folder – Includes selected data elements from the Property (FIMS_TBL_PROPERTY), OSF (FIMS_TBL_OSF) Deferred Maintenance (FIMS_TBL_DEF_MAINT) and Site (FIMS_TBL_SITE) tables.

Site Name	Owned/Ingrant Indicator	Primary Dimension Code	Mission Dependency

Site Number	Deferred Maintenance	Primary Quantity	Asset Type
Area Number	Actual Maintenance	Secondary Dimension	Excess Indicator
Property ID	Required Maintenance	Secondary Quantity	Excess Year
Property Type	Rehab and Improve Cost	Status	Historic Designation
Program Office	Conventional Facility Ind	Status Date	Hazard Category
Property Name	Modernization Indicator	Deficiencies 1-5	
Alternate Property Name	Inspection Date	Acquisition Cost	
Usage Code	RPV	Total Improvement Cost	

Property Folder – Includes selected data elements from the Property (FIMS_TBL_PROPERTY) and Site (FIMS_TBL_SITE) tables.

Site Name	Summary/Detail Indicator	Capitalized Indicator	Usage Code
Site Number	Owned/Ingrant Indicator	Outgrant Indicator	Excess Indicator
Area Number	Mission Dependency	Historical Designation	Excess Year
Property ID	Acquisition Cost	Hazard Category	Status
Property Type	Total Improvement Cost	Main Location	Status Date
Program Office	Acq Cost Estimate Ind	Notes	Alternate Property Name
Property Name	Asset Type	Status	

Property Maintenance Folder – Includes selected data elements from the Property (FIMS_TBL_PROPERTY), Deferred Maintenance (FIMS_TBL_DEF_MAINT), and Site (FIMS_TBL_SITE) tables.

Site Name	Alternate Property Name	Conventional Facility Ind	Excess Indicator
Site Number	Usage Code	Modernization Indicator	Excess Year
Area Number	Owned/Ingrant Indicator	Inspection Date	Historic Designation
Property ID	Deferred Maintenance	Acquisition Cost	Main Location
Property Type	Actual Maintenance	Total Improvement Cost	Status
Program Office	Required Maintenance	Mission Dependency	Status Date
Property Name	Rehab and Improve Cost	Asset Type	

Reports View (A-List) Folder – Includes selected data elements from the Property (FIMS_TBL_PROPERTY), Building (FIMS_TBL_BUILDING), OSF (FIMS_TBL_OSF), Deferred Maintenance (FIMS_TBL_DEF_MAINT), and Site (FIMS_TBL_SITE) tables.

Site Name	Outgrant Indicator	OSF Unit of Measure	Refuse Cost
Site Number	Ownership	OSF Quantity	Recycle Cost
Area Number	Asset Type	OSF Secondary UOM	Grounds Cost
Property ID	Building RPV	OSF Secondary Quantity	Snow Removal Cost

Property Type	OSF RPV	Electricity Cost	Gas Cost
Status Code	Actual Maintenance	Water Cost	
Status Code Description	Deferred Maintenance	Central Heating Cost	
Mission Dependency	Hazard Code	Central Cooling Cost	
Excess Indicator	Hazard Code Description	Janitorial Cost	
Excess Year	Status Utilization	Pest Control Cost	

Site/Area Folder – Includes selected data elements from the Site (FIMS_TBL_SITE) and Area (FIMS_TBL_AREA) tables.

Site Name	Site State	Water Cost	Refuse Cost
Area Name	Site Zip Code	Central Heating Cost	Recycle Cost
Site Number	Secretarial Ofice	Central Cooling Cost	Grounds Cost
Area Number	Field Office Code	Janitorial Cost	Snow Removal Cost
Site Mailing Address	Geographic Cost Factor	Pest Control Cost	
Site City	Electricity Cost	Gas Cost	

Site Maintenance Folder – Includes selected data elements from the Site (FIMS_TBL_SITE) and Site Maintenance (FIMS_TBL_SITE_MAINT) tables.

Site Name	Total Required Maint Cost	Bldg Actual Maint Cost	OSF Actual Maint Cost
Site Number	Total Actual Maint Cost	Building FCI	Trailer Def Maint Cost
Fiscal Year	Bldg Deferred Maint Cost	OSF Deferred Maint Cost	Trailer Reqd Maint Cost
Total Deferred Maint Cost	Bldg Required Maint Cost	OSF Required Maint Cost	Trailer Actual Maint Cost

Snapshot Folder – Includes selected data elements from the fiscal year-end snapshots which includes the Property (FIMS_TBL_PROPERTY), Deferred Maintenance (FIMS_TBL_DEF_MAINT), Building (FIMS_TBL_BUILDING), Land (FIMS_TBL_LAND), OSF (FIMS_TBL_OSF), AND Site (FIMS_TBL_SITE) tables.

Site Number	Usage Code	RPV Model	Status
Site Name	Owned/Ingrant Indicator	Rehab and Improve Cost	Status Date
Area Number	Deferred Maintenance	Conventional Facility Ind	Hazard Category
Area Name	Required Maintenance	Modernization Indicator	Asset Type
Maintenance Fiscal Year	Actual Maintenance	No of Buildings	OSF Quantity
Property ID	Inspection Date	Gross Sqft	Reporting Source
Property Type	Summary Condition	Net Usable Sqft	Urban/Rural Acreage
Program Office	RPV	Excess Indicator	Acquisition Method
Property Name	RPV Flag	Excess Year	